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ABSTRACT

The report of a 3-year project in Santa Cruz, California to develop guidelines for determination of special education program funding levels is presented. The project has resulted in the Santa Cruz Behavioral Characteristics Progression (BCP) which aids the teacher in pupil assessment and the Santa Cruz Task Base Composite (TBC) which helps the administrator describe and relate staff tasks to pupil behavioral objectives. The BCP is reported to be the basis for diagnostic and remedial efforts replacing conventional labeling practices and to serve as an assessment, instructional, and communication tool. The BCP chart is grouped into categories referred to as behavioral strands and is reported to have been used with approximately 1700 students. The TBC is explained to serve as an assessment, planning, and communication tool for staffing and administrative decisions. Approximately 700 progressive tasks, defined as activities of a program staff member, are arranged in chart form in the TBC which has been field tested in Santa Cruz County. (For additional information see EC 060 317, EC 060 318, and EC 060 319.) (DB)

SPECIAL EDUCATION MANAGEMENT SYSTEM PROJECT DOCUMENT

EHA Title VI-B
Project #44-00000-0000-925
ESEA Title III
Project #1328

ED 083765

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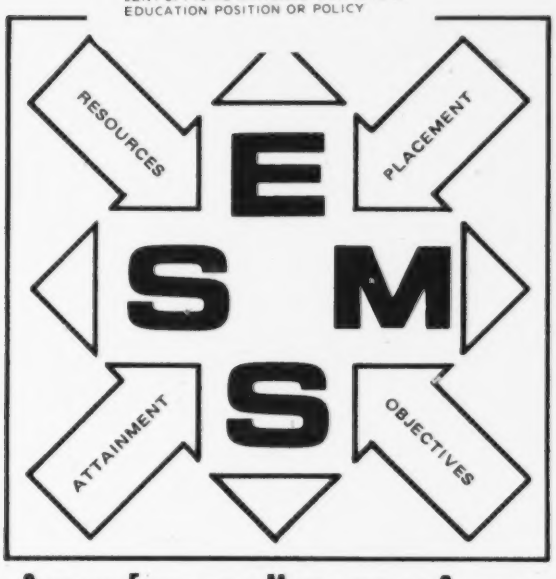

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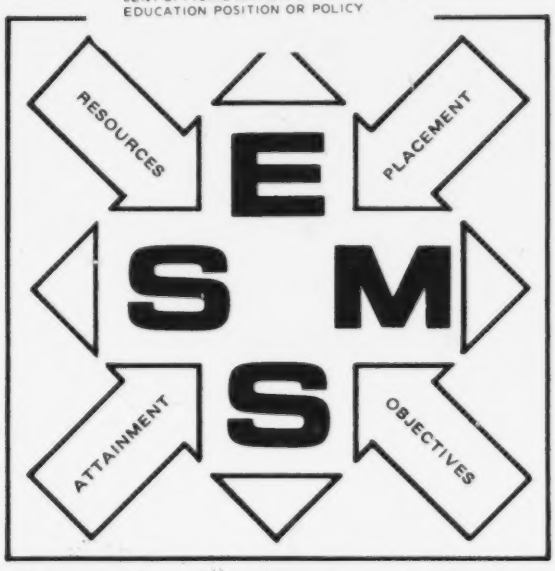

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FOREWORD

Public education has been subjected to increased scrutiny, debate, and criticism over the years. There have been expressions of concern over the school system's inability to provide those benefits of special or general education that parents, taxpayers, and legislators expect from those who manage the "system".

As an educator and administrator, I commend this document to those in the educational community who are dedicated to improving the effectiveness of education. While this material applies most directly to special education, the management tools described in the text and charts have universal application. This document outlines an educational communication system based on management techniques tied directly to pupil needs through staff responsibilities and tasks. It can lead to program and administrative accountability as yet unknown in education.

The efforts of Dr. Wilson Riles and staffs of Title VI-B and Title III have enabled us to move forward with this project.

Richard R. Fickel

DR. RICHARD R. FICKEL, Superintendent
Santa Cruz County Office of Education

PREFACE

In the EHA Title VI-B project proposal, which led to the publication of this document, the statement was made that "there is no available pool of information to assist parents, educators, legislators, and others in determining 'organizational or pupil performance accountability' for special education programs in the state." This statement is not intended to indict the educational community or to disserve the frustrations of parents and legislators. It was intended to form the basis for a complete reappraisal and reordering of our educational goals based upon clearly defined behavioral objectives for exceptional children and adults. The statement is also meant to suggest the need to implement the evaluation of instructional programs and staff as provided for in California Education Code Sections 13485-13489 (Stull). Once the behavioral objectives are established, they can provide for the construction of a workable management system. The tasks or decisions required to bring about each pupil's individualized learner objectives can then be clearly defined and accomplished. All management systems are constructed to serve a consumer or to give direction for the processing or delivery of a product. We are proposing that this document and its supplements will allow us to do this for the educational community's product: the educated child.

RICHARD D. STRUCK, Director
Programs for Exceptional Children
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PROJECT BACKGROUND

The Santa Cruz Special Education Management System Project began in the fall, 1970 under Title VI-B funding. It was the original intent of the project to produce a guide to assist special education administrators in making fiscal and budgetary decisions regarding their various special programs. It was anticipated that the project document would specify the optimal, acceptable and minimal funding necessary to support a given type of program with a given number of pupils (e.g. Development Center for Handicapped Minors, DCHM with 40 pupils).

However, early in the project, it was realized that unless the specific behavioral characteristics of the pupils in the program were considered (as well as the type of program and the number of pupils), funding would remain somewhat arbitrary. It was learned through classroom observation and special educator consultation that programs of the same type with the same number of pupils, often contain pupils who are behaviorally very different and who have varied educational needs. What would be optimal acceptable or minimal funding for one program might not necessarily be the case for another program. For example, optimal funding for a Development Center with a population of twenty profoundly retarded teenagers who display few physical or behavioral problems, might not be optimal for a Development Center of twenty young retarded and cerebral palsied pupils who require feeding and toileting. It was learned from further research in the area, that the behavioral characteristics of pupils in like programs throughout the state may vary considerably.

With this knowledge, the project staff began considering a means of relating fiscal and budgetary standards to the specific behavioral characteristics and behavioral objectives of the pupils in the program. It was felt that any decisions an administrator makes regarding funds for a program should be based directly upon the needs of the pupils in that program. An administrator could not be expected to hire appropriately trained staff, plan a program budget, describe staff activities and determine job descriptions for his staff until he had identified the needs of the pupils to be served by the program.

A system to relate pupil needs to funding standards was developed by the project staff based upon the following process:

1. Identify behavioral characteristics of pupils.
2. Determine optimal behavioral objectives for pupils.
3. Choose teaching method or strategy to attain behavioral objectives.
4. Determine materials, equipment and facilities necessary for chosen teaching method.
5. Determine cost of materials, equipment and facilities necessary for chosen teaching method.
6. Identify staff tasks necessary to attain behavioral objectives.
7. Determine time required to complete identified staff tasks.
8. Determine cost of staff time required to complete identified tasks.
9. Determine total optimal funds necessary to attain optimal behavioral objectives.
10. Determine effect on attainment of behavioral objectives if only acceptable or minimal funding is provided.

The Santa Cruz Special Education Management System staff began in the first year of the project (Title VI-B funding) to develop a tool to assist special educators in completing steps 1-5 of the above process. The Santa Cruz Behavioral Characteristics Progression (BCP) was developed to help the teacher assess the pupil in behavioral terms to plan behavioral objectives and methods, to track pupil progress and to communicate this information to others.

During the second year of the project, (continued Title VI-B funding), the staff developed a tool to assist special educators in completing steps 6-10 of the above process. The Santa Cruz Task Base Composite (TBC) was devised to help the administrator describe staff tasks and relate these tasks to pupil objectives and progress. With such detailed information, he would better be able to plan an educational program, and budget for and hire the necessary and appropriate staff to carry out the program.

During the third year of the project (Title III funding), the staff completed development of the BCP to make it relevant for mentally, behaviorally and physically exceptional pupils. Concomitantly, the Task Base Composite was further developed and revised so as to provide a workable process for special educators. At the conclusion of the third year of the project, a management system with the pupil and his behavioral objectives as the focal point realized completion.

DESCRIPTION OF THE SPECIAL EDUCATION MANAGEMENT SYSTEM

The Santa Cruz Special Education Management System uses the BEHAVIORAL CHARACTERISTICS PROGRESSION (BCP) as its main information tool regarding the pupil. When a child suspected of needing special services is referred to a special education department, appropriate information regarding this child is related to the BCP. The first referral source, whether parent, doctor, welfare worker or teacher, is asked to fill out a referral checklist, based on the BCP. A portion of this checklist appears below:

**** REFERRAL CHECKLIST ****

Child's Name_____ Person Referring_____
Parent or Guardian_____ Position_____
Address_____ District/ Co. Office_____

Please check (✓) which of the following strands of behavior represent problems for the child being referred. Circle strand numbers of greatest concern. Please limit the number of strands to those most critical.

___ 1. HEALTH

Displays symptoms of: O Eczema O Hayfever O Migraines O Epilepsy O Uncleanliness O Malnutrition O Fatigability O Sleep disturbances O School phobia O Battered child O Constant cold O Enuresis O Nervousness . . . O Requires medication to remain calm O Reads written material incorrectly--visual problem O Does not follow oral directions--hearing problem O Eats pencils, crayons, paste, paper O Requires special equipment to sit, stand

___ 2. ATTENDANCE/PROMPTNESS

O Is often absent/truant from school O Is often late for class or activities O Tells time inaccurately or not at all

___ 3. FEEDING/EATING

O Eats only blended or strained foods O Thrusts food out of mouth w/tongue O Gags on foods O Sucks food instead of chewing it O Bites down on spoon when inserted into mouth O Chews foods only partially before swallowing O Swallows foods w/out chewing them O Chews in other than rotary motion O Takes lg. pieces of food into mouth w/out gagging O Eats w/fingers O Crumbles food in hand when finger feeding O Drools while eating O Spits out food O Holds spoon/fork in fist rather than fingers

___ 4. DRINKING

___ 9. NASAL HYGIENE

O Allows nose to run continuously O Blows nose only when asked/reminded O without covering nose and mouth.

___ 10. ORAL HYGIENE

O Swallows rinse water O Applies an excess or inadequate amount of toothpaste to brush O Brushes using improper strokes O Chews on toothbrush O Neglects to turn off water when finish brushing

___ 11. SELF-IDENTIFICATION

O Confuses body parts O Fails to name family members, relations, friends O Gives address incorrectly or only partially O Reports phone number incorrectly O Confuses right and left hands O Confuses male-female labels O Omits personal information on job application form

___ 12. SENSORY PERCEPTION

The information contained on this checklist assists the special education staff in identifying which are the greatest need areas of the child at the time of referral. These designated need areas can be used as a partial basis for determining which standardized and non-standardized tests should be administered for diagnostic purposes.

Following the administration of these tests, information gathered from diagnostic testing can again be related to the BCP. Where possible, diagnosticians such as the psychologist, nurse, social worker, therapist and teacher begin marking their findings on the child's individual BCP chart. Many items on standardized tests such as the Vineland Social Maturity Scale, Frostig Developmental Test of Visual Motor Perception and Stanford-Binet Intelligence Scale are similar to behavioral characteristics on the BCP. Diagnosticians can mark on the child's BCP chart whether or not he passed a corresponding test item. At the conclusion of testing, tentative BCP strands are identified by the diagnostic staff as the child's greatest areas of need.

The child's designated strands are then compared to the BCP strands taught by the available special education programs. This comparison results in the child being placed in the program which most closely matches his needs.

When the pupil enters the classroom, the teacher receives the BCP strand recommendations of the diagnostic staff as well as the specific results of testing recorded on the BCP. This information gives the teacher a good indication where to begin with classroom observation of the pupil.

The next step in the process is the complete assessment of the pupil on the BCP by the teacher and the support staff following the step-by-step procedures outlined on the back of the BCP charts. From this complete assessment of the pupil and discussions with staff, behavioral objectives are chosen so that his specific individual educational needs may be met. These objectives are recorded on the BCP chart and on the Learner Objectives Worksheet (see sample on back of chart).

The pupil's newly determined behavioral objectives, as recorded on the Learner Objectives Worksheet, are then compared to the skills taught in the program in which he has been tentatively placed. This comparison results either in final validation of his program placement or the placement of the pupil in another program which more closely matches his specific individual educational needs.

With final validation of placement, the teacher can begin to consider methods to attain the learner objectives he/she has chosen for the pupil. Support staff may be consulted for suggestions concerning appropriate and successful methods to use. After choosing a method, the teacher determines what materials, equipment, and/or special facilities might be required to attain the designated objectives.

The parent is then consulted at this time in regard to the learner objectives chosen for his or her child. The parent is asked for approval or modification of these objectives. Learner objectives are revised based upon this input. Also, Learner Objectives for the parent to work on at home may be chosen at this time. These objectives are also recorded on the BCP chart.

Using the Learner Objectives Worksheets for all pupils in the program, the administrator can select from the Santa Cruz TASK BASE COMPOSITE (TBC) List the tasks necessary to accomplish these objectives. At this time, the personnel position (e.g., teacher, aide, nurse) responsible for accomplishing the task is also identified. Completing these two steps results in descriptions of the program and descriptions of each of the positions in the program based upon very specific tasks.

The next step in the process is to determine through staff discussion and negotiation which specific person (e.g., which Teacher) will do which specific tasks in the position description. This determination results in individual job descriptions based upon specific tasks. At the same time, any in-service training required to complete the tasks listed on the job description can be specified for each staff member.

Individual job descriptions developed thus far in the process are implemented for a given period of time (e.g., 4-6 months). During this period, staff members are asked to complete as many tasks as possible in their job descriptions and to note the time it takes to complete each task. After a given period of time, task time estimates are obtained from each staff member. A summation of these estimates

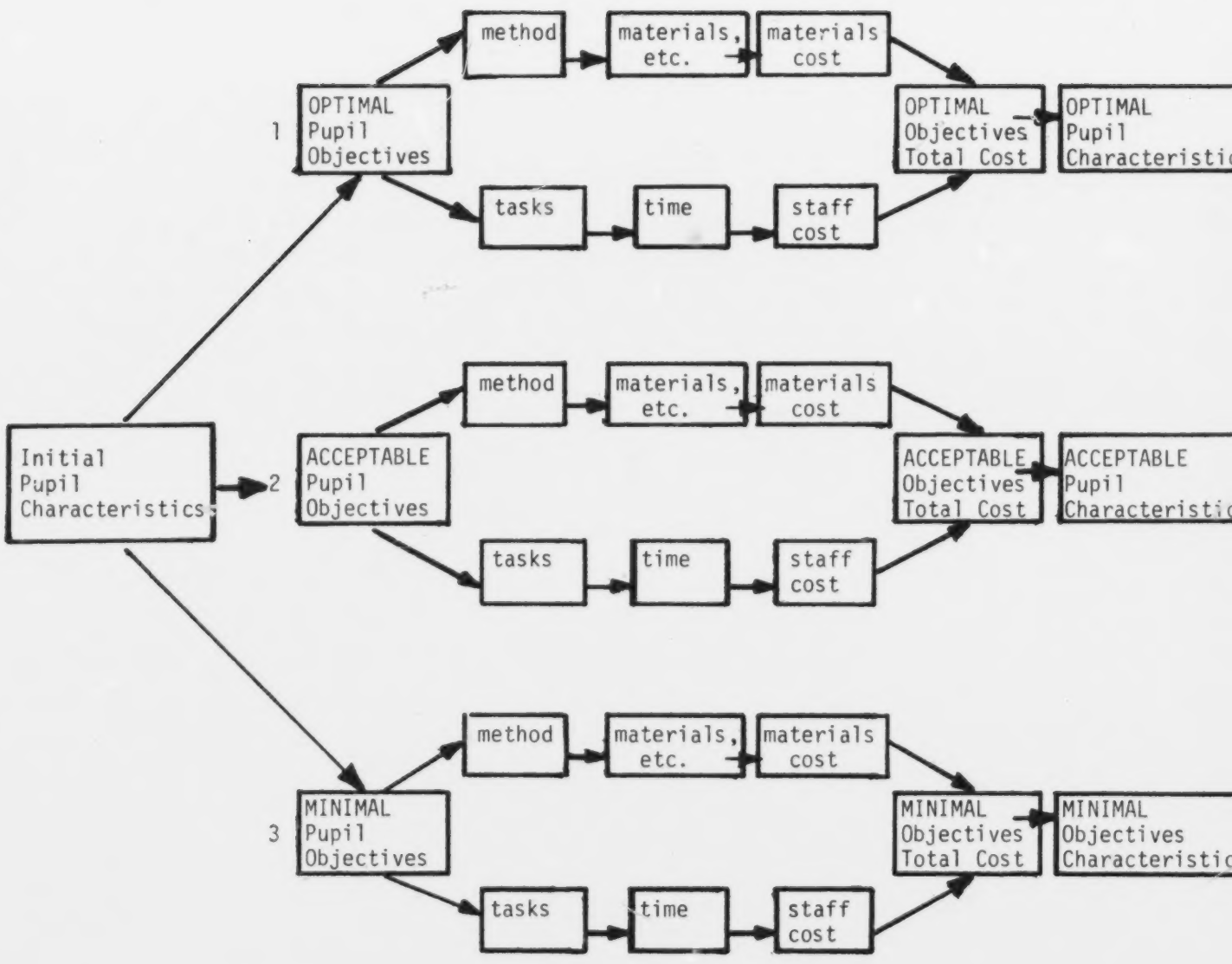
results in the total task time required for each position (e.g., teacher, aide, nurse) in the program. Dividing this total by the typical contract time for the position results in an estimate of the number of people in each position required to complete the tasks.

At this point in the process, the following information is available:

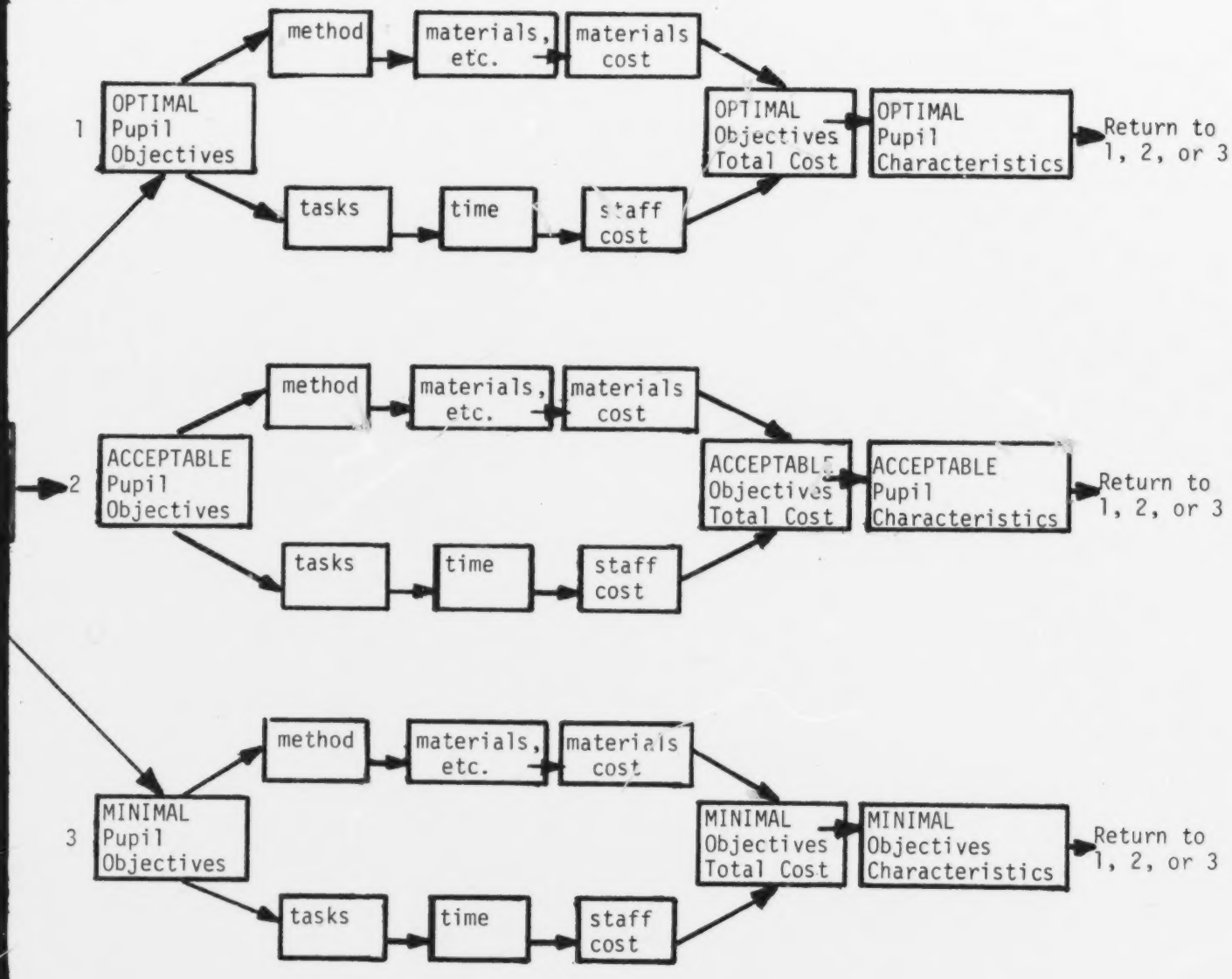
- Learner objectives for each pupil in the program.
- Methods chosen to attain the objectives.
- Materials, equipment and facilities required to attain the objectives.
- Staff tasks required to attain the objectives.
- Number of staff required to attain the objectives.

With the above information as a basis, the administrator can determine the materials, equipment and facilities costs and the staff costs for the program. A combination of these two figures results in the total funding required to attain the specified learner objectives.

A program budget derived through the Special Education Management System process (BCP and TBC) can be submitted to the Board of Education or other agency for approval. If the Board decides to increase or decrease the amount of budgeted funds, the administrator can adjust the learner objectives of the pupils in the program as well as the materials, equipment, facilities and staff, to reflect this change. Following is a sample chart showing the effect of various levels of funding upon the amount and degree of learner objectives selected.



Relationship of Funding Levels to Objectives Selected



Relationship of Funding Levels to Objectives Selected

After a program budget and concomitant learner objectives have been finalized, instruction of the pupils toward their objectives begins. Pupils are observed on a continuous basis to determine their progress and BCP charts are updated to reflect this progress. Learner Objectives Worksheets are filled in when objectives are attained and parents are informed of their child's progress.

Staff members can be evaluated based upon pupil attainment of specified learner objectives and upon completion of tasks on their job descriptions which promote objective attainment. Also, it can be determined at this time whether adequate support was provided to each staff member by others on the staff to facilitate objective attainment.

DESCRIPTION OF THE BCP

The BEHAVIORAL CHARACTERISTICS PROGRESSION (BCP) is part of Santa Cruz County's Special Education Management Project funded under E.H.A. Title VI-B and E.S.E.A. Title III. Within this project, the BCP serves as the major assessment, instructional and communication tool. As an assessment tool, the BCP provides the teacher and/or diagnostician with a comprehensive chart of pupil behaviors to assist in identifying which behavioral characteristics a pupil displays and which he does not. As an instructional tool, the BCP aids the special education teacher in developing individualized and appropriate learner objectives for each pupil. As a communication tool, the BCP offers a historical recording device which can be used throughout the schooling of the pupil to display his progress and to help communicate this information to all those concerned with the pupil's educational program.

The BCP, although designed to fill the specific needs of the special education management system, also will provide an effective tool for educators attempting to implement the provisions of the Stull Bill. According to this bill, now Education Code Sections 13485-89, district and county school boards must establish "standards of expected student progress in each area of study and of techniques for assessment of that progress." Also mandated by this bill, the competency of certificated personnel will be measured by the degree to which students have met or exceeded these standards of pupil progress. The BCP offers to school boards and administrations a technique of measuring pupil progress in a clearly visible format and, to teachers, a means of assessing a pupil's need areas and of prescribing individualized learner objectives to fill those needs.

The BEHAVIORAL CHARACTERISTICS PROGRESSION is a nonstandardized continuum of behaviors in chart form. It contains 2400 observable traits referred to as behavioral characteristics. Ages and labels have been discarded and behavioral characteristics have been grouped into categories of behavior called behavioral strands. Behavioral strands generally begin at # 1.0 on the BCP with the most primary characteristics and progress toward more complex characteristics. The strands generally end at #50.0 with characteristics which approximate what society considers "appopriate" or "acceptable" adult behaviors. The BCP has identifying behaviors describing some of the handicapping behaviors which mentally, behaviorally and

physically exceptional children might display in each of the behavioral strands. These identifying behaviors assist the teacher in focusing on the basic need areas of the pupil and in determining priorities of learner objectives.

The columns are numbered across the top of the BCP chart but may not reflect exact developmental sequencing or spacing. Those who teach exceptional pupils know that all children do not follow the same developmental sequence. The developmental time between increments #16.0 and #17.0 on one strand may vary from the time between the same increments on another strand or for increments #16.0 and #17.0 on the same strand. The numbering system is used primarily to assist in location of characteristics and also to denote that #15.1, #15.2, #15.3, etc., can be added by the teacher if it is determined that there are behavioral steps between #15.0 and #16.0 not presently included in the BCP.

The BCP chart is used to display the behavioral characteristics in a manner that permits visual consideration of behavioral relationships. Specific behaviors do not develop independently of other behaviors; they are influenced by and have influence upon the total behavior of the pupil. For example, when a child is learning to walk, the instructor often says "come to me" and holds out his arms. The child is thus being instructed in at least three different strands, Listening, Language Comprehension and Gross Motor I (strands 22, 20 and 16). The two-dimensional BCP chart provides a perspective of behavior which helps the instructor see behavioral interactions and thus determine realistic and comprehensive behavioral objectives for the pupil.

The BCP is in a progression form to facilitate teacher selection of behavioral objectives. After determining the pupil's behavioral characteristics, it is intended that the teacher consider the increments which follow these characteristics (or increments which have been skipped) on the specific strand as possible objectives. For example, if a pupil displays all behavioral characteristics to #19.0 on a certain strand, an appropriate objective may be determined by considering characteristics #20.0, #21,0, and so on, in that strand. Or if a pupil displays characteristics #1.0 and #3.0, the teacher might consider #2.0 as a possible objective. Choice of objective is the teacher's decision since

he is in the best position to judge time, materials, and staff constraints. The BCP is not intended to subordinate the pupil to its progression. All children do not follow the same developmental sequence. The BCP is to be used to guide the teacher in identifying and communicating to others which behavioral characteristics a pupil displays and which he does not.

The BCP is a guide for special educators; it is a nonstandardized, criterion-referenced tool. If the BCP should be standardized in the future, the purpose will be to increase the reliability of its content and sequence, not to develop norms for each behavioral characteristic. Therefore, use of the BCP should not preclude gathering data on a pupil through normative testing with the W.I.S.C., the Stanford Binet, the I.T.P.A. and other such tests.

The BEHAVIORAL CHARACTERISTICS PROGRESSION also appears in Observation Booklet format, used during initial observations to record the pupil's behavior. Each behavioral strand is one or more pages in the booklet, and on each page there are columns for observations of six pupils. A teacher can use one or more booklets per class, depending on how many pupils are being assessed. The booklet format makes it easy to record each child's characteristic relative to a strand, whether he is displaying the characteristic by himself or whether the class is engaged in a group activity. Full descriptions of identifying behaviors appear at the top of the first page of each strand in the booklet.

DEVELOPMENT OF BCP-1

The initial concept of a developmentally progressing chart of behavioral characteristics grew out of project staff discussions with consultants in the field of mental retardation. Several decisions concerning format and content were made by the staff early in the chart's development.

The first of these decisions concerned wording of characteristics. It was decided that as a reliable measuring stick for the educational process, the characteristics used to describe and distinguish a child's educational status would be most meaningful if observable and objective; in other words, they must be behavioral characteristics. Capabilities or potentials of a handicapped child would not be considered as

his behavioral characteristics since, as such, they would allow opportunities for individual interpretation or guesswork. Behavioral characteristics, it was decided, would represent a pupil's behaviors as demonstrated by the pupil and observed by another.

In order that behavioral characteristics be useful as descriptors of pupil behavior, the project staff decided that the characteristics should be specific enough to permit observation yet at the same time be practical. For example, the exceptional child often exhibits a short attention span. Would a characteristic on the level of "exhibits normal length attention span" be helpful to a teacher attempting to describe a pupil to his parents? It seems unlikely, since such a characteristic would probably omit all the steps a pupil takes to progress from a short attention span to a normal one. Also, the word "normal" should be replaced with a more objective description. To solve this latter problem, a specified amount of time can be substituted for the word "normal," thus resulting in a characteristic "exhibits a 5 to 10 minute attention span." However, this still represents a very general behavior leaving the possibility of differing individual interpretation. What exactly is an attention span? Is it possible to define this characteristic in operational terms; in terms of observable behaviors? Replacing attention span with something more specific could result in "Attend to task for 5 to 10 minutes when supervised." However, as most teachers would agree, whether the pupil likes the task makes a difference in his attention span. With this addition, the behavioral characteristic appears as it does on the BCP chart (#15.0 on Attention Span): "Attends to easy/familiar task for 5 to 10 minutes when supervised." This seems more useful than the original general characteristic. However, how does one know when to stop this breaking down of behavior into increasingly specific increments? Couldn't the word "task" be further defined in terms of what in particular the pupil is working on? This might result in "draws shapes for 5-10 minutes when supervised." And then the types of shapes could be specified. One could proceed until he reaches a point of diminishing returns, when the usefulness of specifics begins to decrease. The more specific the behavioral characteristics becomes, the more limited is its application. A tradeoff must be made between these two aspects: precision of behavioral description and limitation of behavioral description.

The second consideration concerned labeling the behavioral characteristics on the chart according to age or level or type of handicap. Such labels have been found to be helpful to educators by indicating what behaviors to expect of a pupil of a given mental age or type of handicap. However, labels have also served to limit a pupil's progress. Much research was done in the area of labeling and its effects on pupils (See Appendix for a summary). The project staff concluded from this research that teacher expectations hindered more than helped special education pupils. It was decided to eliminate all labels from the BCP and provide the educator with a progressive format of behaviors which occur at approximately the same developmental stage.

With the above two decisions made--to phrase all characteristics in observable and specific terms and to eliminate all labels from the chart--the project staff began reviewing all available assessment tools, developmental charts, and curriculum guides. (See Appendix for listing.) Behavioral characteristics appearing in the majority of these materials were included in the progression. Characteristics which were too general to be observable or which were potentials, rather than demonstrated abilities, were reworded so as to meet the previously determined criterion of behavioral characteristics. From the information available at that point, a preliminary draft of the BEHAVIORAL CHARACTERISTICS PROGRESSION was developed.

FIELD TESTING PHASE

This preliminary draft was then field-tested by the project staff. Pupils enrolled in Santa Cruz County's Development Center for Handicapped Minors (DCHM) and Trainable Mentally Retarded (TMR) Special Training Classes were assessed on the BCP chart. From this initial test, the feasibility of using such an assessment-instructional instrument was determined. Several sequence and content revisions were made as a result of the information obtained from pupil observations.

Santa Cruz County's DCHM and TMR teachers were asked at this stage to offer their expertise and comments regarding the BCP format, content, and sequence. A major revision followed and a final field test version of the BCP was printed in August, 1971. It offered approximately 1,000 behavioral characteristics grouped into 29 behavioral areas or strands.

An extensive field test of this chart, BCP-1, was begun in September, 1971. Six programs, with a total pupil pupulation of 415, volunteered for the field test. Of this total, 140 pupils were enrolled in Development Centers, 175 in TMR programs, and 100 in programs for children with emotional/psychological problems. A list of programs and individual staff members participating in this testing phase appears in the Appendix.

BCP field testing followed a defined schedule. First, prospective participants were given an introductory lecture-discussion to ensure that they understood the purposes of the BCP and were willing to offer criticism and suggestions for improvement throughout the field test. They were then requested to familiarize themselves with the BCP materials before the next meeting. One or two workshop sessions followed in which procedures for BCP use were reviewed task by task. Questions were answered at this time and suggestions on how to improve the procedures themselves were elicited. During these workshops, the project staff assisted the field test participants in determining realistic schedules for BCP observations. Field testing was then begun and was monitored by the project staff at least every 3 to 4 weeks. During this monitoring, suggestions were offered to the participants on methods of observations; criticisms, suggestions, and comments made by the participants were recorded; questions from the participants were answered; and in some cases, assistance in pupil observation was provided by the project staff. Throughout the field testing period, participants filled out BCP Evaluation Forms and forwarded them to the project staff. This feedback technique ensured that if the project staff was not available to hear criticisms and suggestions, all comments would be recorded for later review. A final meeting was held at the completion of the testing during which time participants summarized their conclusions regarding the BCP.

Field testing was viewed as a two-way process. Programs using the BCP gained a useful method of recording baseline behavioral data on their pupils and determining relevant learner objectives to meet their pupils' needs. The project staff received invaluable feedback as to the format, content, sequencing, applicability, readability, and time requirements of the BCP.

DEVELOPMENT AND FIELD TESTING OF BCP-2

During the field testing stage of BCP-1, a second BCP was being developed to chart the behavioral characteristics of behaviorally exceptional children. Few available assessment tools, developmental charts or curriculum guides were concerned with the behavioral areas (e.g., impulse control) in which pupils classified as educationally handicapped have the greatest need of improvement. For this reason, the project staff carried out extensive research on exceptional behavior (See the Appendix) and conducted many classroom observations of programs serving pupils in this category (See the Appendix for a listing of classes visited). From the information obtained through this research and observation, a mock-up version of BCP-2 was constructed.

The project staff then conducted several consultations with educators at all levels of the school system. The mock-up BCP-2 chart was used to illustrate the BCP concept and to offer some of its content in sample behavioral areas such as Impulse Control. Added to this chart was a section titled "Identifying Behaviors" which appeared in a space before each strand. Under this heading were listed some of the problem behaviors associated with each strand. From consultations with educators, it was concluded that a progressive listing of the characteristics of behaviorally exceptional pupils was possible and needed.

More research and assessment tools were reviewed and in January, 1972, a preliminary version of BCP-2 was printed. Field testing on a pupil population of 50 was begun shortly thereafter. Of this group, 40 were educationally handicapped pupils and 10 were emotionally disturbed. Field testing followed the same schedule as that determined for testing of BCP-1, including workshops, monitoring, continuous evaluation, and meetings of participants. Participants are listed in the Appendix. Testing was completed in April of 1972.

Throughout this period of field testing, the BCP was shown to recognized authorities in the field of special education, to conference and convention participants, and to administrators and teachers with whom the project staff had contact. All suggestions, criticisms, and comments made by these people were recorded on evaluation forms.

FINAL REVISION

With the conclusion of field testing of both BCP-1 and BCP-2 came the final revision of the chart as indicated by feedback from the field, research, observations, and consultations. All BCP evaluation forms were reviewed and their content incorporated into the BCP materials. In June, 1972, two BCP charts were completed. BCP 1-22 contained strands in the areas of self help, perceptual-motor and language. BCP 23-45 contained strands in the areas of social skills, academics, recreational skills and vocational skills.

During the project's third year, 1972-73, the BEHAVIORAL CHARACTERISTICS PROGRESSION (BCP 1-45) was implemented in various programs throughout the state and was used to assess over 1200 special education pupils. Also, as part of this third project year, the BCP was expanded to include strands appropriate to physically exceptional pupils.

Much research was conducted in Special Education to develop the previous BCP. This year, however, the specific areas of the deaf, hard of hearing, blind, partially sighted, orthopedically handicapped and speech impaired were emphasized.

Following this research, observations of physically handicapped classes were undertaken. Pupils enrolled in these classes were observed to determine the special needs they displayed not served by the present BCP strands (1-45). Teachers, physical, occupational and speech therapists and experts in the field of the physically handicapped were consulted to solicit assistance in developing strands for this population. Tools to assess and prescribe for deaf, blind, orthopedically handicapped and speech impaired were reviewed.

Information gathered from the above sources was synthesized into the field test draft of BCP 46-57. In March, 1973, two hundred copies of this draft were distributed to special educators for their review and criticism. In June, a final revision of the newly developed strands was made based upon field input. With the inclusion of Sign Language, Finger Spelling, Speechreading, Orientation I and II, Mobility I and II, Wheelchair Use, Ambulation, Swimming, Posture, Health, Articulation I and II, the BCP was expanded to contain 59 strands. It could now be used to assess mentally, behaviorally and physically handicapped pupils.

TIME REQUIREMENT

The most common alteration suggested during the field test and implementation phase of the BCP concerned the amount of time required to observe and record pupil behavior. Because of the precision and breadth of the BCP, initial observations and determination of a pupil's behavioral characteristics may require a significant amount of time. The time period depends upon the behavioral level of the pupil, the observer's knowledge of the pupil's behavior, his skill in behavioral observation, and how closely the BCP content and the school's educational program are matched. However, once the pupil's description has been completed, the teacher has a behavioral baseline from which objectives can be readily determined. During subsequent assessments of the pupil, the BCP booklet may no longer be used. The observer need only consider on the chart those few increments of behavior located near the pupil's behavioral characteristics and objectives. It is during these later evaluations that the BCP can actually save time, especially for those teachers who previously prepared lesson plans and goals and objectives without the aid of an ongoing assessment-instructional tool.

It is suggested that school districts implementing the BCP designate the first 3-4 weeks of school as primarily diagnostic, rather than instructional. These first weeks would be spent in concentrated BCP observations to determine what should best be taught during the remainder of the school year. The thoroughness of the baseline data which the BCP offers could greatly assist the classroom teacher in developing learner objectives toward which his future educational tasks can be directed. Instead of continuing instruction and spending only part of each day observing, it is suggested that the teacher devote as much of each day as possible (approximately 4 hours) to observing pupil behavior until objectives for each pupil are determined. By allowing teachers this initial period of time for BCP diagnosis and prescription, school districts would ensure that the teacher begins the school year with an accurate behavioral picture and up-to-date learner objectives for new as well as previously enrolled pupils.

The BCP is continued to be used during the instruction of the pupil. It is updated when a pupil learns the behavioral objective and a new one is selected for him from the chart. Time required to use the BCP during the instruction of pupils is minimal.

APPLICATION TO VARIED POPULATIONS

The Behavioral Characteristics Progression was designed for and can be used to assess mentally, behaviorally and physically exceptional pupils at all levels. It is applicable to retarded pupils from the profoundly retarded to the mildly retarded, to educationally handicapped pupils from the seriously-emotionally-disturbed to the EH pupil who spends only part of his day in a special class and to physically handicapped pupils with a wide range of handicapping conditions. Most pupils in public, private, and state hospital schools can be assessed on the BCP. It has been successfully used to assess pupils in self-contained classes, in Learning Disability groupings and in modularly-scheduled classes.

Procedures for use of the BCP appear on the back of the charts.

BCP QUESTIONS AND ANSWERS

WHAT DO THE NUMBERS 1.0 TO 50.0 ON THE BCP MEAN? These numbers are used only for location purposes. Each behavioral characteristic can be located by citing its strand name and its number (e.g., Fingerspelling #35.0). There are no ages nor levels tied to these numbers. That is, #1.0 does not mean the behavioral characteristic develops at 1 year, 1 month or 1 week, but only that it is the first behavioral characteristic listed.

WHAT ARE IDENTIFYING BEHAVIORS? Identifying behaviors are the most common problems or deficiencies associated with each behavioral strand. These listings are helpful in determining the greatest need areas of each pupil.

IS THE BCP DEVELOPMENTAL? The BCP offers a progression of behaviors from most simple to most complex. It is meant to be used as a developmental guideline for special educators. Since no two children develop according to the same sequence, it is usual for pupils assessed on the BCP to "skip" behavioral characteristics.

WHY ARE THERE NO LABELS (TMR, EMR, EH) NOR AGE NORMS ON THE BCP? Research has shown (See Appendix) that label and age norm expectations can limit a pupil's developmental progress. The BCP assists the teacher in illustrating which instructional objectives a pupil has mastered and which he has not. It does not compare one pupil's performance to any other pupil. Each pupil is considered an individual with his own strengths and weakness.

WHY ARE THERE THREE BCP CHARTS? Because of size limitations, the 59 BCP strands had to be grouped into areas and placed on separate, more easily managed charts. BCP 1-22 contains the self-help, perceptual-motor and language strands. BCP 23-45 contains the social, academic, recreational and vocational strands. BCP 46-59 contains strands appropriate for the deaf, blind, orthopedically handicapped and speech impaired. These charts are to be considered all part of the total BCP. A pupil may be assessed on selected strands from all three charts.

HOW MANY BCP CHARTS ARE NEEDED TO ASSESS A CLASS OF PUPILS? One set of BCP charts is needed per pupil. After each pupil's chart(s) has been completed, a "master chart" to show grouping of pupils may be prepared.

IS THE BCP CHART NEEDED? WHY NOT USE THE BCP OBSERVATION BOOKLET? The BCP chart provides a visual display of the pupil's total performance: a "gestalt" of the child. The chart shows how different areas of behavior affect one another and how they are interrelated. The booklet format requires flipping of pages to compare behavioral areas and provides no quick picture of the pupil's strengths and weaknesses.

MUST A TEACHER ASSESS A PUPIL ON ALL 59 BCP STRANDS? A teacher or other observer may choose to assess a pupil on as few or as many behavioral strands as desired. A county office or school district may request its teachers to begin assessing all pupils on one or a few strands and increase the number throughout the year.

HOW MUCH TIME IS INVOLVED IN OBSERVATION AND CHARTING? To obtain a baseline assessment on 20-25 strands for a class of 10 or 12 pupils, it takes approximately 3-4 weeks. If fewer pupils are assessed on fewer strands, the time requirement is lessened considerably. Once the baseline assessment is made, time required to update the BCP to reflect attained behavioral objectives or regressed behavioral characteristics is minimal.

HOW OFTEN ARE BCP OBJECTIVES UPDATED? Objectives may be reviewed continuously or periodically. Pupils with short-term objectives (e.g., less than one month) should probably be reviewed often (e.g., each day, each week). Pupils with longer term objectives (e.g. 6 months or one year) may be reviewed two or three times per year.

WHAT DOES ONE DO IF HE CHOOSES AN OBJECTIVE FOR A PUPIL WHICH IS NOT ON THE BCP? First, the objective is written in specific and behavioral terms. Then it is decided which strand it best fits into (e.g., Impulse Control). Then it is determined specifically where on that strand it belongs and is numbered accordingly (e.g., an objective between #7.0 and #8.0 might be number 7.1). If the objective is further along the progression than #50.0, it can be numbered 51.0, 52.0, etc.

AFTER OBJECTIVES ARE CHOSEN FOR A PUPIL USING THE BCP, HOW DOES THE TEACHER REACH THESE OBJECTIVES? The BCP itself is method-free: it does not indicate how to get from one objective (e.g., #25.0) to another (e.g., #26.0). Methods have been purposely discarded from the BCP so it can be adapted by teachers of many educational backgrounds using varying instructional techniques. However, currently, instructional methods and materials are being developed and related to BCP objectives (See Appendix for Sample CATALYST CARDS). When this methods bank is completed, a teacher may determine objectives for a pupil and feed them into a computer to receive several possible methods of attaining these objectives. The teacher may then choose the method(s) he or she is best able to use.

WHAT TYPES OF PUPILS CAN BE ASSESSED ON THE BCP? Thus far, the BCP has been successfully used to assess pupils in classes for EH, LDG, DCHM, TMR, EMR, OH, MH, Mentally Disordered (autistic), Drug Dependent, Deaf, Hard-of-Hearing, Blind, Partially Sighted, Aphasic and other Speech Impaired, and Handicapped Adults. It may also be used to help individualize the education of normal pupils.

WHAT DOES A TEACHER DO WITH THE BCP AFTER COMPLETING THE INITIAL ASSESSMENT? BCP charts are posted on walls, placed on flip chart racks, bound like books, placed on newspaper or blueprint racks or bound with tagboard and stored on a shelf. Whichever method is used, the BCP is best used if accessible and easily read. The charts are intended to follow the pupil as he moves from class to class, teacher to teacher, and school to school.

CAN THE BCP CHARTS BE MADE LESS CUMBERSOME? Yes, the BCP charts can be reduced approximately 50%. The project has provided a copy of this reduced size BCP chart in its Special Education Management System Project Document.

WHAT IS A BEHAVIORAL STRAND? A strand is a horizontal grouping of behavioral characteristics. Strands begin with #1.0 and end near #50.0.

WHEN CHOOSING AN OBJECTIVE FOR THE PUPIL, MUST THE TEACHER CHOOSE THE NEXT BEHAVIOR ON THE BCP? No. The teacher is free to choose any objective for the pupil within the behavioral strand.

DESCRIPTION OF THE TBC

The TASK BASE COMPOSITE (TBC) is part of the Santa Cruz County's Special Education Management System Project funded under E.H.A. Title VI-B and E.S.E.A. Title III. Within this project, the TBC serves as a major assessment, planning and communication tool. As an assessment tool, the TBC provides the special education administrator with a comprehensive chart of staff tasks to assist in identifying which activities are presently being accomplished in a given program. As a planning tool, the TBC aids the administrator in determining which tasks need be accomplished and by whom in order to attain specified learner objectives. As a communication tool, the TBC can be used as a basis for staff and administrative discussions regarding program, position and job descriptions and manpower loading. It may serve as a recording device for this information and can be changed periodically to reflect current program operations.

The TBC, although designed to fill the specific needs of the special education management system, also will provide an effective tool for educators attempting to implement the provisions of the Stull Bill. According to this bill, the competency of certificated personnel will be measured by the degree to which pupils have progressed. Using the TBC process, tasks necessary to attain learner objectives can be identified and job descriptions based upon these tasks can be formulated. By providing district and county school administrators with a means of determining negotiated and detailed job descriptions, staff performance can be more fairly evaluated.

The TASK BASE COMPOSITE is a progression of approximately 700 tasks in chart form. Tasks are defined as activities a staff member in the program accomplishes. Tasks have been grouped into three general categories: Learner Line Tasks which are those directly involving the pupil and are in the center of the chart; Preceeding Tasks which are those accomplished before the Learner Line Tasks and are on the upper half of the chart; and Succeeding Tasks which are those accomplished after the Learner Line Tasks and are on the lower half of the chart. Functional headings such as "Assessment and Placement","Instruction" etc., appear on the chart to help define the general area of the task. Tasks begin at 1.0 on the left-hand side of the chart with the referral of the pupil into the program, progress through the education of the pupil in program and conclude at task 114.0 on the far right-hand side of the chart with the return of the pupil to his home.

Each task cell is numbered to assist in locating tasks. All 1.0, 2.0, 3.0, etc., numbers are Learner Line Tasks. All 18.23 2.5, 44.2, etc., numbers are Preceeding or Succeeding Tasks. All tasks which relate to a given Learner Line Task and therefore appear above or below it, have the same number prefix. (e.g. Task 3.7 appears directly below Learner Line Task 3.0).

The TBC Chart is used to display staff tasks in a manner that permits visual consideration of the sequence and relationship of tasks to one another. The placement of Preceeding and Succeeding tasks demonstrates which tasks most probably must be accomplished before or after each task directly involving the pupil. This visual picture of the operation of the educational system can help administrators more realistically determine which tasks are necessary to be accomplished in a given special education program as well as who might best accomplish these tasks. Manpower requirements and manpower loading is much simplified using the TBC Chart.

The TBC is in sequential form to make its content more readily understandable to its users. It is not necessarily a complete listing of tasks necessary for all Special Education Programs nor is it necessarily the correct sequence of tasks in all programs. The TBC is to be used as a guide for special educators; it is a nonstandardized tool. Tasks may be added, deleted or re-sequenced as the user sees fit.

The TASK BASE COMPOSITE also appears in a Task List format, used during program, position and job description negotiation and discussion. The list format is easier to carry and use than the chart format. The chart is primarily for display and summary purposes. One TBC Chart and one TBC Task List are needed for each program being assessed or planned.

DEVELOPMENT OF TBC-1

The development of the TBC is a result of EHA Title VI-B and ESEA Title III funding of a Santa Cruz County Office of Education proposal to develop a Special Education Management System. It was determined

that a tool to describe and define special education programs was necessary. This tool would have to provide job descriptions for the personnel involved in these programs and would also have to relate these description to the special education pupil.

Many special education programs in the state were observed to elicit the types of activities which occurred what staff members were involved in them and the duration of these activities. The Special Education Programs in three areas were selected to collect specific task and time data: Santa Cruz County, Pajaro Valley Unified School District and Los Angeles Unified School District.

In each of these programs, the staff were asked to fill out Task Description Forms (TDF's) for a period of three weeks. These forms allowed 130 teachers and 50 administrators and support personnel to record their tasks and the approximate duration of these tasks. Approximately 25,000 Task Forms were collected.

The project staff then synthesized these forms into 700 tasks which were sorted into 20 functions. These tasks were displayed on the first Task Base Composite Chart which was printed in August 1972, along with procedures for its use.

FIELD TESTING PHASE

During the 1972 - 1973 project year, the TBC Chart and approach were field tested in Santa Cruz County Office of Education, Fresno County Department of Education and San Juan Unified School District Special Education Programs. Field testing consisted of implementing the TBC approach to describe special education programs and develop job descriptions. Included in this field test phase were many discussions with staff regarding modifications to permit the TBC to be used more easily, present the task information more readily, and improve the content.

From the field test and discussions, certain recommendations were obtained:

1. Modify the chart so that the tasks are in a linear format.
2. Ensure that the pupil is visible in the process.
3. Refine the content of each task.

4. Relate the content to the BCP in a more obvious fashion.
5. Determine the best method of obtaining the required descriptive and statistical data.

DEVELOPMENT AND FIELD TESTING OF TBC-2

During 1972-73, a second version of the TBC chart was developed encompassing the first four recommendations. This linear version, with a "learner line", was field tested in Santa Cruz and also presented at the CEC Convention in May, 1973, to obtain comment and further recommendations. Additionally, this version was sent to county superintendents, a portion of special education administrators, and those people most familiar with the project to obtain their comments. The final version of the TBC is based on this input.

The fifth recommendation, that of refining the TBC process, was accomplished during both phases of the field testing. It was determined that lists of tasks, rather than computer cards with tasks printed on them, were much more efficient for selecting tasks and personnel positions to describe programs.

FINAL REVISION

It was found during field testing that staff task-time estimates were so inaccurate that a familiarization period was added to the process to enable the staff to complete all tasks specified in their job descriptions over a given time period. This experience, it was felt, would improve estimates of the time it takes to accomplish the particular tasks. The forms used to collect and manipulate task and time information, as well as the procedures for accomplishing these activities, were also modified.

Procedures for use of the TBC and the TBC Task List appear in component 3 of this project document. Samples of data collected during field testing are located in the Appendix.

TBC QUESTIONS AND ANSWERS

WHAT IS THE TBC? The TBC is a collection of over 700 staff tasks displayed in a linear format to assist in developing program and job descriptions which relate to pupil progress.

WHAT IS THE LEARNER LINE? The Learner Line contains those staff tasks that directly involve the pupil.

WHAT DO THE COLORS ON THE CHART MEAN? The colors on the chart are used to quickly identify whether the task involves the pupil (Learner Line tasks are blue), whether the task is accomplished before the Learner Line task (preceding tasks are yellow), or whether the task is accomplished after the Learner Line task (succeeding tasks are green).

WHAT DO THE TASK NUMBERS SIGNIFY? These numbers are used to locate and sequence tasks. Tasks that precede or succeed Learner Line tasks and relate to them have similar number prefixes (e.g., task 3.7 relates to Learner Line task 3.0).

HOW MANY TBC CHARTS ARE REQUIRED FOR EACH PROGRAM? Each special education program should use one chart (e.g., one for elementary EH program, one for the secondary TMR program, etc.).

HOW DOES THE TBC PROCESS RELATE THE PUPIL TO THE ADMINISTRATION OF A PROGRAM? The TBC displays the movement of the pupil through an educational program in terms of the staff and administrative tasks required to progress him. Additionally, the TBC relates pupil progress (tracked by means of the BCP) to staff evaluations, program evaluations and budget determination as well as program development.

MUST ALL THE STEPS OF THE TBC PROCEDURES BE ACCOMPLISHED TO MAKE USE OF THE TBC PROCESS? No. Different administrators will judge different portions of the process more important than others. Job descriptions might be considered more practical than program descriptions by one administrator. Another might find that obtaining program cost estimates is not practical due to the insufficiency of information available. The procedures should be read through and the portions which are deemed useful for particular programs should be implemented.

IS STAFF AGREEMENT REGARDING JOB DESCRIPTIONS NECESSARY? Yes. An integral part of the TBC process is agreement between administration and staff on what constitutes appropriate descriptions of staff tasks. In this way, a plan is developed through negotiation that best serves the pupil by taking advantage of each staff member's professional training and experience. Additionally, agreement between staff and administration improves communication by clarifying expectations regarding job responsibilities, training and support requirements.

WHAT IS THE TIME INVOLVED IN USING THE TBC? To select the tasks and personnel positions for each program, approximately 1 1/2 hours is required of someone who is familiar with program content and operations. To review the resultant position descriptions takes approximately one hour per staff member. To estimate the time it takes to complete each task on the Task Data Collection and Conversion Sheet takes approximately one to six hours per staff member (depending upon the number of tasks assigned to him). The majority of the time involved is clerical since all reports obtained using the TBC process are generally produced by clerical staff. The time required to produce these reports varies greatly depending on the size of the program and the number of personnel.

WHAT TYPES OF PROGRAMS CAN USE THE TBC? The TBC was developed and field tested on Special Education programs. However, it contains tasks common to most areas of education and will probably provide adequate descriptions and information for most educational programs and populations.

WILL THE TBC FORCE ME INTO A MECHANISTIC OPERATION? No. The TBC process is flexible. It is to be used as a guide to define programs and related staff tasks. It provides a framework for obtaining specific information with which the administrator can better manage his program(s) and make more informed decisions. Modification of TBC content is not only possible, it is encouraged so that the TBC is better tailored to the multitude of existing special education programs.